

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
September 2015**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. Comprehensive Campaign Report

## **Advancement Committee Report Alumni Relations Report September 2015**

**Homecoming:** Homecoming at Wright State has been evolving for many years. Programming for students, alumni, and friends is generated primarily from the Office of Alumni Relations and the Office of Student Activities. A majority of the events target affinity based audiences with the exception of the Homecoming Festival.

Homecoming Festival 2015 at a glance - A dedicated team of staff representing various departments on campus has been working annually to generate engagement of alumni, students, donors, and friends of Wright State during homecoming weekend. The Homecoming Festival has become the anchor for the Homecoming weekend events and is the event that our planning committee hopes will draw the largest, most diverse audience.

Representatives from Alumni Relations, Student Activities, Campus Rec, Event Services, Athletics, Bookstore, and Housing make up the Homecoming Festival planning committee. As of this year, the Homecoming Festival is moving toward a concert type atmosphere. The event will be held in the parking lot of the Rinzler on October 10, 2015, two Wright State alumni (Kate Hasting and Alexis Gomez) will come back to campus to perform in conjunction with the annual Chili Cook Off, men's soccer game, alumni beer tent, local food trucks, and various other activities. The Homecoming Festival Schedule is below.

- 5:30 – 6:45 p.m. Alexis Gomez
- 5:30 p.m. Annual Chili Cook Off
- 7:00 – 9:00 p.m. Wright State Men's Soccer vs. Valparaiso
- 9:30 – 11:00 p.m. The Kate Hasting Band

To learn more about other Homecoming Events, please visit [www.wright.edu/homecoming](http://www.wright.edu/homecoming)

### **Event Updates:**

- **Senior Week:** This past April the Office of Alumni Relations sponsored its annual Senior Week for Wright State seniors about to graduate and become alumni. For our office, this is a great opportunity to connect with the graduating class to educate them about the alumni association and share with them ways they can stay engaged with the university for a lifetime. This year, Senior Week consisted of 8 programs, such as "Senior Sneak Peak" which were behind the scene tours of the new NEC and Student Success Buildings, "Life after College", a series of educational programs that focused on areas like buying vs. leasing a car, buying vs. renting your first home, and managing personal finances, and the "Senior/Alumni Mixer" where students learned the art and science of networking and then were able to put their skills to the test with prominent alumni from the region. Students also received a free professional headshot and 25 business cards.

New to Senior Week this year was a special event, "A Time to Shine, A Toast with President Hopkins". This event was held on the eve of commencement at the Alumni Tower and provided seniors and their families an opportunity to hear President Hopkins address the students and participate in a champagne toast. For most of the seniors, this event commemorated the last time they would be on campus as a student. We had 60 students and their parents in attendance for this first annual event.

The two most attended events of Senior Week were the Alumni/Senior Happy Hour at Fox & Hound and the Mixer and the 8th Annual Senior Send-Off Picnic at the Alumni Tower. Each of those two programs had over 100 students in attendance. Overall, Senior Week was a huge success. Across the 8 programs that made up Senior Week, we engaged over 500 students!

- **Wright State Day at the Cincinnati Reds:** In July, the Alumni Association sponsored its annual Cincinnati Reds trip. This year the Greater Cincinnati Alumni Network, the Greater Dayton Alumni Network, and the Graduates of the Last Decade Alumni Society collaborated to provide a great program for all of our local alumni. This year's itinerary included a backstage tour of Great American Ballpark, tour of the Reds Hall of Fame, and a special baseball themed discussion by Wright State Professor, Dr. Scott Peterson. This year's Cincinnati Reds Trip sold out at 85 attendees.
- **Alumni College:** The first weekend in August was our third annual Alumni College Weekend. We had 28 alumni come in from all over the country to attend the event. Presentations varied from social media to the constitution and medical studies to generational differences.
- **Legacy Scholarship Golf Outing:** 80 golfers were in attendance and over \$16,000 was raised for the Legacy Scholarship fund.

#### **Alumni Society Fundraising Updates:**

- Fraternity / Sorority Alumni Society is in the midst of an online fundraising campaign to encourage gifts to the newly established scholarship fund.
- Nonprofit Leadership Alliance Alumni Society conducted an online fundraising campaign in mid-April to encourage gifts to match a \$1000 pledge for the NLAAS Scholarship fund and held a guest bartender event on July 27 to raise funds for the fund. Due to their efforts, the NLAAS scholarship fund established in Nov. of 2012 has reached the \$10,000 endowment level.
- The College of Nursing and Health Alumni Society has conducted many fundraisers throughout the year to raise funds for the CONH Alumni Society Scholarship fund. (Wine tastings, raffles, and dine to donate)

**Upcoming Wright State Alumni Events:** (Find more information at [wrightstatealumni.com](http://wrightstatealumni.com))

- September 9 – Social Work Alumni Society Annual Beer/Wine Tasting & Silent Auction
- September 10 – Rise. Shine. New York
- September 12 - 13 - 5th Annual Bourbon Tour
- September 24 – Dayton Happy Hour at the Dayton Beer Co. (downtown)
- September 25 – Southern California Rise. Shine.
- September 26 – Guardian Reunion
- September 26 - Columbus Crew Game
- September 26 – CareFest: A Day of Service in St. Petersburg
- September 27 – Fraternity/Sorority Alumni Society Throwback Happy Hour
- September 27 – Ringling Bros. and Barnum & Bailey presents Legends
- October 8 – Lake Campus Scholarship Wine Tasting
- October 9-11 – Homecoming Weekend
  - October 9 – Organizational Leadership Wine Tasting
  - October 9 – Alumni Achievement Awards
  - October 9 – College of Education and Human Services Trivia Night
  - October 10 – Alumni Association Scholarship Brunch
  - October 10 – Club Football Reunion/Alumni Tailgate
  - October 10 – Student Athlete Alumni Cookout
  - October 10 – Homecoming Festival at the Rinzler
- October 17 – Washington D.C. Rise. Shine
- November 12 – Lake Campus Guest Server Night @ Bella’s Italian Grille
- November 13 – Boca Ciega Bay 3-hour Yacht Cruise
- November 13 – Rise. Shine Cincinnati
- December 5 – Lake Campus Region Alumni Holiday Getaway
- December 17 – Nonprofit Leadership Alliance Alumni Society Holiday Party
- January 16 – Alumni Day at the Game
- February 20 – WSUAA Annual Beer Tasting

**Advancement Committee Report  
Wright State University Foundation Report  
September 2015**

The Foundation’s endowment portfolio ended the year in positive territory, but only marginally so. The net annual return for the portfolio was 2.25%, 85 basis points higher than its composite benchmark. If private equity returns are factored in (for which there is no associated benchmark), the return is bumped up to 2.63%. Although the FY15 return was well below the Foundation’s policy target of 8%, the 3- and 5-year returns did exceed that target at 8.78% and 9.30%, respectively. The endowment portfolio ended the fiscal year with a market value of just under \$80 million.

The Foundation’s Investment Committee debated several allocation changes in the endowment portfolio toward the end of the fiscal year. Approved changes reallocated our investments away from fixed income and increased our equity and alternative asset exposures. The table below reflects these changes and includes a new allocation to energy debt. Approved reallocations in the alternative space had not been accomplished by year-end, which accounts for the unusually high amount in cash and equivalents.

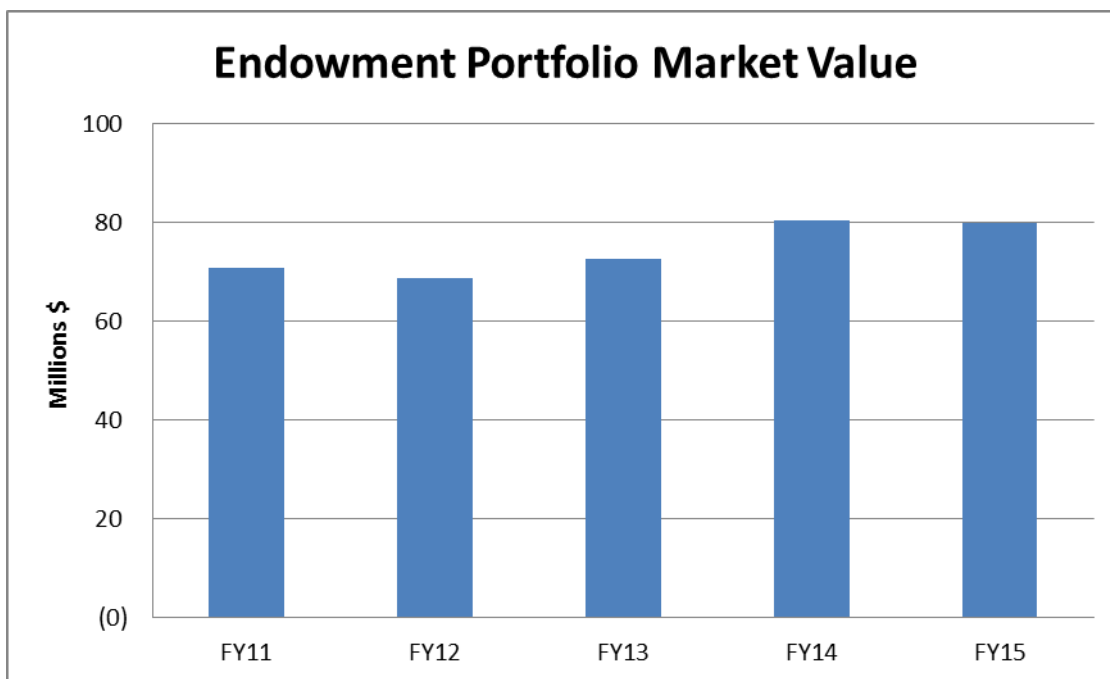
The Foundation’s net asset position suffered a significant (18%) loss in FY15 due partially to the muted investment earnings discussed above and as well to robust spending in support of our fund raising campaign and the University’s branding initiative. While receiving only 61% of the revenues anticipated during the year, the Foundation spent 84% of its budget authorization. This resulted in a nearly \$1.7 million loss in unrestricted net assets. Unrestricted net assets at the end of FY15 were \$7.6 million.

The Foundation’s current endowment target allocation, actual allocation, and market values as of June 30, 2015, are presented below:

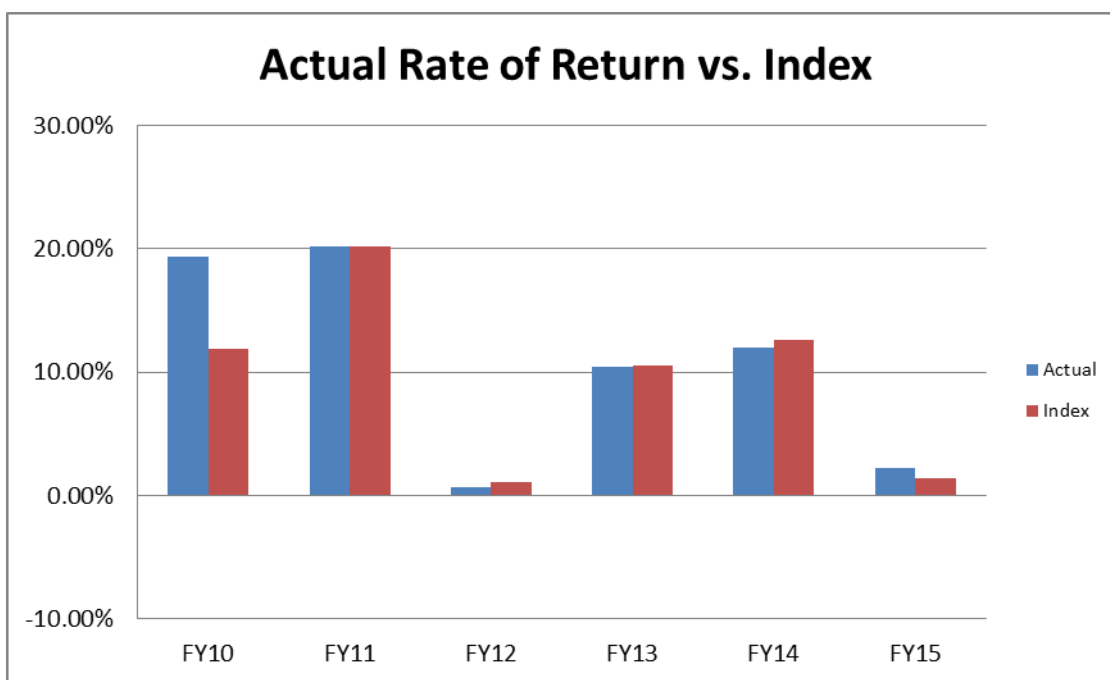
**Endowment Portfolio Composition**

<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value June 30, 2015</b>
<b>Equity</b>	<b>54%</b>	<b>48%</b>	<b>\$38,591,977</b>
<b>Fixed income</b>	<b>23%</b>	<b>27%</b>	<b>21,252,673</b>
<b>Hedge funds</b>	<b>8%</b>	<b>13%</b>	<b>10,334,809</b>
<b>Private equity</b>	<b>8%</b>	<b>3%</b>	<b>2,449,314</b>
<b>Structured credit</b>	<b>3%</b>	<b>4%</b>	<b>2,919,589</b>
<b>Energy Debt</b>	<b>4%</b>	<b>0%</b>	<b>-0-</b>
<b>Cash &amp; equivalents</b>	<b>0%</b>	<b>5%</b>	<b>4,400,000</b>
<b>Totals</b>	<b>100%</b>	<b>100%</b>	<b>\$79,948,362</b>

## Endowment Value

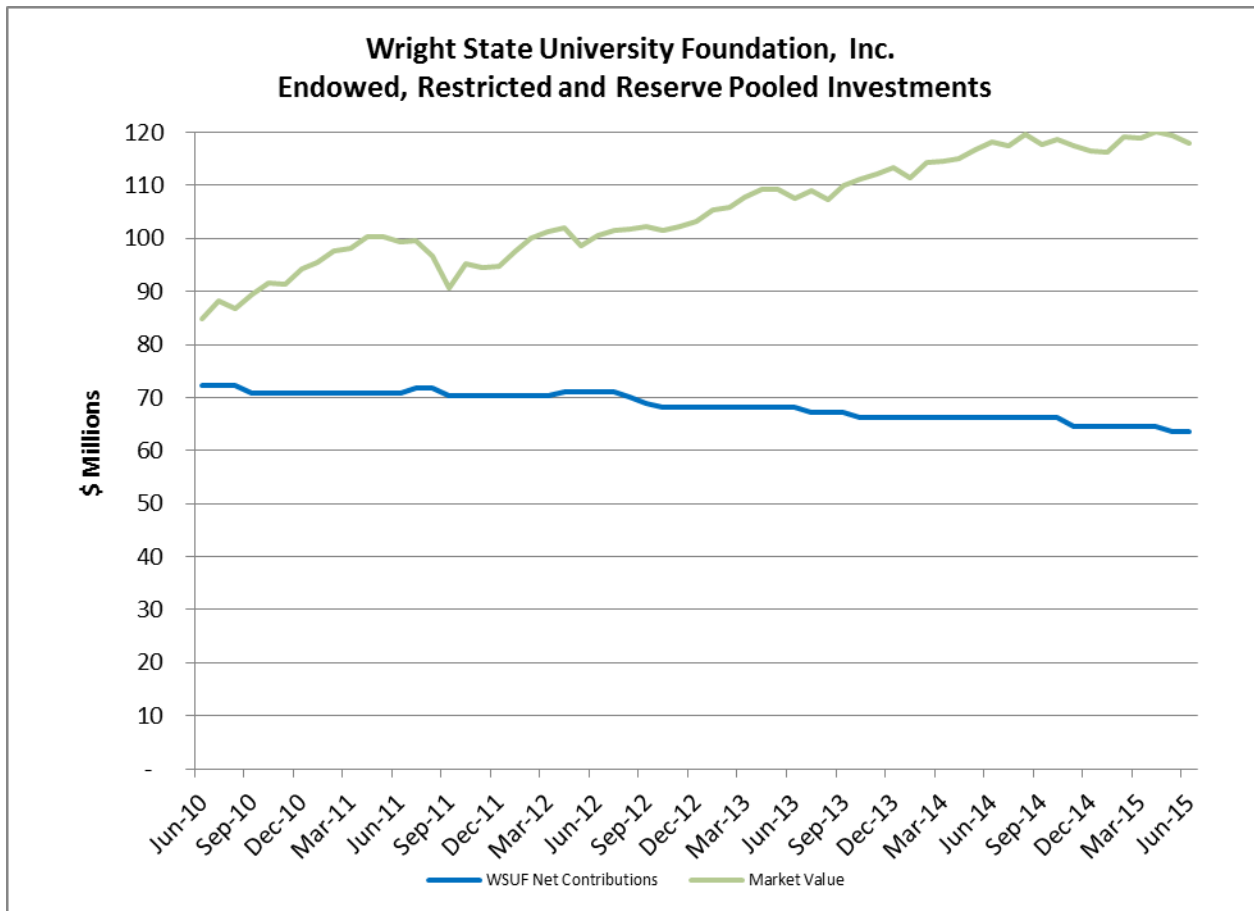


## Endowment Historical Rates of Return



Current index composed of Russell 1000 (20.2%), Barclays US Aggregate Index (15.0%), MCSI All Country World Ex US Index (13.5%), Barclays Capital 1-5 Yr US TIPS Index (14.1%), HFR FOF Diversified (14.1%), Russell 2000 (5.8%), 50% S&P 500/50% Barclays 10 Yr Trea BW (3.9%), BOFA ML US HY Master II Index (3.9%), JPM EMBI Global Diversified (2.9%), DJ Wilshire Resi (3.3%), SOF Structured Credit Fund (3.3%).

### All Portfolios Value vs. Contributions



**WRIGHT STATE UNIVERSITY FOUNDATION, INC.****Report of Total Receipts: Cash and Gifts-in-Kind****For the Month Ended August 31, 2015 and 2014****MONTH-TO-DATE**

GIFT SOURCE	AUG 2015		AUG 2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	417	\$57,083	359	\$41,261	16%	38%
Corporations	27	137,396	22	284,722	23%	-52%
Foundations and Organizations	6	11,239	7	41,487	-14%	-73%
Friends	406	57,995	398	39,956	2%	45%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>856</b>	<b>\$263,713</b>	<b>786</b>	<b>\$407,426</b>	<b>9%</b>	<b>-35%</b>
Gifts-in-kind	2	140	4	12,405	-50%	-99%
<b>TOTAL ALL RECEIPTS</b>	<b>858</b>	<b>\$263,853</b>	<b>790</b>	<b>\$419,831</b>	<b>9%</b>	<b>-37%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2016		FY2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	600	\$200,647	553	\$85,660	8%	134%
Corporations	52	306,570	39	648,281	33%	-53%
Foundations and Organizations	8	55,984	19	167,129	-58%	-67%
Friends	628	136,857	629	122,754	0%	11%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>1,288</b>	<b>\$700,058</b>	<b>1,240</b>	<b>\$1,023,824</b>	<b>4%</b>	<b>-32%</b>
Gifts-in-kind	4	1,345,485	11	35,235	-64%	3719%
<b>TOTAL ALL RECEIPTS</b>	<b>1,292</b>	<b>\$2,045,543</b>	<b>1,251</b>	<b>\$1,059,059</b>	<b>3%</b>	<b>93%</b>



**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

**Report of Fundraising Totals By Source and Unit**

**Fiscal Year-to-Date to August 31, 2015**

(including totals from prior fiscal year)

**BY SOURCE**

SOURCE	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE DEFERRED GIFTS <sup>3</sup>	GIFTS OF PROPERTY <sup>4</sup>	REVOCABLE DEFERRED GIFTS <sup>5</sup>	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Alumni	\$112,473	\$66,150	\$0	\$100	\$500,000	\$678,723	\$212,092
Corporations	220,720	40,000	0	1,345,345	0	1,606,065	551,618
Foundations and Organizations	55,983	0	0	40	0	56,023	187,199
Friends	100,080	1,001	0	0	0	101,081	168,093
<b>CURRENT FYTD TOTALS</b>	<b>\$489,256</b>	<b>\$107,151</b>	<b>\$0</b>	<b>\$1,345,485</b>	<b>\$500,000</b>	<b>\$2,441,892</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$646,551</b>	<b>\$232,216</b>	<b>\$0</b>	<b>\$35,235</b>	<b>\$205,000</b>		<b>\$1,119,002</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-24.3%</b>	<b>-53.9%</b>	<b>N/A</b>	<b>3718.6%</b>	<b>143.9%</b>	<b>118.2%</b>	

**BY UNIT**

UNIT	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE DEFERRED GIFTS <sup>3</sup>	GIFTS OF PROPERTY <sup>4</sup>	REVOCABLE DEFERRED GIFTS <sup>5</sup>	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Boonshoft School of Medicine	\$83,576	\$35,000	\$0	\$0	\$0	\$118,576	\$351,194
College of Education & Human Services	2,080	0	0	0	0	2,080	5,466
College of Engineering & Computer Science	78,146	0	0	0	0	78,146	23,754
College of Liberal Arts	9,796	0	0	0	0	9,796	182,638
College of Nursing & Health	23,680	5,000	0	0	0	28,680	260,965
College of Science & Math	1,575	50	0	1,345,345	0	1,346,970	7,415
Curriculum & Instruction	3,308	0	0	0	0	3,308	16,155
Enrollment Management	4,402	0	0	0	0	4,402	29,193
Intercollegiate Athletics	62,908	1,001	0	0	0	63,909	25,425
Lake Campus	300	40,000	0	0	0	40,300	40,113
Other	164,516	26,100	0	0	500,000	690,616	127,520
Raj Soin College of Business	36,520	0	0	0	0	36,520	30,150
School of Professional Psychology	3,000	0	0	0	0	3,000	5,050
Student Affairs	12,309	0	0	140	0	12,449	12,584
University College	0	0	0	0	0	0	0
University Libraries	3,140	0	0	0	0	3,140	1,380
<b>CURRENT FYTD TOTALS</b>	<b>\$489,256</b>	<b>\$107,151</b>	<b>\$0</b>	<b>\$1,345,485</b>	<b>\$500,000</b>	<b>\$2,441,892</b>	
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<sup>1</sup> Cash, checks, credit cards, electronic transfers, matching gifts, insurance premiums, etc.

<sup>2</sup> Conditional, deferred, irrevocable and revocable pledges.

<sup>3</sup> Charitable gift annuities, charitable lead trusts (CLTs), charitable remainder trusts (CRTs), life estates, pooled income funds, Foundation-owned insurance policies, etc.

<sup>4</sup> Gifts-in-kind, real property (land and buildings), tangible personal property (vehicles, equipment, books, art, auction items, etc.), intangible personal property (patents, copyrights, etc.), etc.

<sup>5</sup> Bequest intentions, donor-owned insurance policy beneficiary, donor-owned retirement asset beneficiary, etc.

**Advancement Committee Report  
Development Report  
September 2015**

**Planned Giving Update**

Results for FY2015

A total of 18 new planned gift commitments were secured in FY15 for a projected gift value of \$3,489,383. Included was one charitable gift annuity and one new life insurance policy. The remainder are bequests.

An additional 11 planned gifts are in discussion with an estimated projected value of \$4,160,000. There are 33 more potential planned gifts that are in early stage discussion.

**Annual Giving Update**

Annual gift solicitation (gifts of up to \$10,000) will be more significant during the broad-base appeals made during the public phase of the Rise. Shine. Campaign. Besides enabling the broad constituency base to participate in the Campaign and build toward reaching its overall financial goal, this effort will build the platform for future fundraising efforts by engaging more donors, increasing current individual giving levels, and identifying new major gift prospects.

Fall Phonathon – September 12 – November 12

The nine-week campaign will begin on September 12. Students will be trained and make calls seven days a week (with double sessions on the weekend) to reach a goal of \$395,000 this fiscal year. For the third year, the services of consultant Wilson- Bennett Technologies are being employed to manage this year's two Phonathon campaigns. Phonathon raised nearly \$265,000 in FY15 with an improved fulfillment rate of 75%, which is up about 10% over FY14.

Strategies moving into FY16

- Two additional weeks during fall and spring Phonathon
- Evaluating energy spent on non-donors who have received calls from WSU over the last four Phonathon campaigns and continually decline to make a gift

Fall Direct Mail Appeal

The annual fall direct mail appeal will begin on October 29. It will be customized with students in each academic area who received the appeal and branded with the Campaign's Rise. Shine. markings.

New initiatives included:

- Suggested giving amounts
- Encouraged donors to jump up to the next giving society
- We included the Wright State University Alumni Association scholarship appeal

Phonathon and Fall Appeal – Multi-Channel Strategy

New in FY16 will be a multi-channel approach for identified segments. Three segments in the fall will pilot our multi-channel strategy: Accountancy, Lake Campus, and Alumni Association. Fall appeal direct mail will drop around October 12, with Phonathon calling beginning 7-9 days later with very specific scripting related to the mail piece.

2015 CSIC

FY15 results \$523,138, an increase of nearly \$23,500 compared to FY14 at the end of the fiscal year. In addition, at the end of the fiscal year 2015, participation was 57% from full time faculty and staff.

2015 CSIC results will be calculated through December 31, 2015: 2014 CSIC raised \$842,678, 60% participation.

Student Giving

Increasing student understanding of philanthropy and student giving to Wright State will receive particular emphasis again this academic year. In August, our Graduate Student who also serves as our President for the Student Philanthropy Council attended the CASE ASAP annual conference.

In 2015/2016, we will continue to build our GivingTuesday and Tunnel Takeover activities to increase student philanthropy at Wright State.

**Advancement Committee Report**  
**Rise. Shine. *The Campaign for Wright State University***  
**September 2015**

**Comprehensive Campaign Activity**

- Gifts and pledges of \$118,829,375 have been accepted as of 8/31/2015
- Current presidential ask proposals total \$85 million
- College/school proposals outstanding represent \$36 million in asks

- Tracking of the four donor classifications includes these totals:

Alumni	\$25,537,062	21.5%
Friends	\$33,090,227	27.8%
Corporations	\$49,398,155	41.6%
Foundations	\$10,803,930	9.1%

- Gifts have been committed in these three areas:

Individuals	\$40,326,919	(students and their success)
Environments	\$40,413,398	(capital projects)
Innovations	\$38,089,057	(programmatic investments)

**FY '16 Year-End Goal:** \$150,000,000

**Campaign Impact to Date:**

- Gifts have been received from 14,394 friends and 11,453 alumni
- 27,676 individual gifts have been received (also includes foundations & corporations)
- Since the beginning of the *Rise. Shine. Campaign* we have made 32,882 contacts including 7,900 face-to-face visits!
- First-time gifts to Wright State comprised \$14.8 million of the total
- Since the start of the campaign we've presented 1046 proposals with 571 accepted (54.3% acceptance rate)

**Campaign Emphasis:**

- Hosting public launch events this fall (NYC, LA, Washington DC, Cincinnati)
- Generating new scholarship funds for all purposes
- Raising funds for the Neuroscience Engineering Collaboration Building, Creative Arts Center, Student Success Center Building, and the Archives
- Securing new endowed chair and professorship gifts

**Tom Hanks Visit:**

- Collaborating with the Hanks' team to secure spring dates for his campus visit